

**Planning Research Report:**

# **Economic Development and Prosperity**

**Department of Planning  
Baltimore County**

**Winter 2013**



Baltimore County Department of Planning

# Planning Research Report

2013 Report [Economic Development and Prosperity](#)

## Contents

<b>A Hub of Superior Employers .....</b>	<b>2</b>
<b>Thriving Economic Expansions .....</b>	<b>6</b>
<b>State Leader in Industry Clusters .....</b>	<b>8</b>
<b>Professional and Services Economy .....</b>	<b>9</b>
<b>A Diversified Economic Structure.....</b>	<b>11</b>
<b>Commutation, Occupation, and Employment .....</b>	<b>14</b>
<b>Conclusion .....</b>	<b>17</b>



Baltimore County Department of Planning

## Planning Research Report

2013 Report ○ Economic Development and Prosperity

*This **Planning Research Report** series, an e-publication of Baltimore County Department of Planning, summarizes the recent data and trend analysis on demographics, economic development, and housing prices and affordability in Baltimore County.*

### A Hub of Superior Employers

Baltimore County ranks 2<sup>nd</sup> in total employment (jobs by place of work) in Maryland, following Montgomery County. There are 510,000 full-time or part-time jobs in the county. Major employers (Chart 1, p. 3) provide more than 71,000 jobs for county residents or workers residing in the Baltimore region, other Maryland jurisdictions, or different states (Map 1, p. 5; map keys are shown in Chart 1).

Baltimore County is the headquarters of some leading corporations, including: T. Rowe Price, Carefirst Blue Cross of Maryland, McCormick Corporation, Becton Dickinson & Company, AAI Corporation, and Stanley Black Decker.

The county is proudly equipped with outstanding educational and medical institutions, providing services for people who reside, work, or tour in the county or Baltimore region.

Baltimore County is one of the hubs in Maryland for federal government agencies including Social Security Administration, Centers for Medicare and Medicaid Services, and Federal Bureau of Investigation. The Social Security Administration and Centers for Medicare and Medicaid Services are among the economic engines for not only Woodlawn in Baltimore County but also the entire Baltimore region. Likewise, government and military intelligence concentration, such as Lockheed Martin, continues to produce jobs in Baltimore County.

There are 13 incubators in the Baltimore region. Four of them are located in Baltimore County, according to the Maryland Department of Business and Economic Development. The Global Business Incubator on the Towson University campus opened in 2006 was the first incubator in Maryland to focus on international businesses. In addition to the incubator at the Towson University, three other incubators in Baltimore County are

#### Key Facts:

Major employers are located in Towson, Owings Mills, Woodlawn, Catonsville, Hunt Valley, and Middle River. The county is the home to headquarters of some leading corporations, prime location of a number of major companies' establishments, and one of state hubs for federal agencies.



## Baltimore County Department of Planning Planning Research Report

2013 Report ○ Economic Development and Prosperity

located in the bwtech@UMBC on the University of Maryland at Baltimore County (UMBC) campus. Those three incubators have been established for high-tech business start up, cyber-security, and clean energy service support for a variety of businesses in the Baltimore region.

**Chart 1a. Major Employers in Baltimore County by Number of Employees, 2012**

Industry Type	Employer Name	Location	Employment	Map Key
Government	Social Security Administration	Woodlawn	12,750	1
Government	Centers For Medicare and Medicaid Services	Woodlawn	4,000	2
Hospital	St. Joseph Medical Center	Towson	3,400	3
Hospital	Greater Baltimore Medical Center	Towson	3,331	4
Hospital	Franklin Hospital	Middle River	3,300	5
Education	University of Maryland Baltimore County	Catonsville	3,258	6
Education	Towson University	Towson*	2,937	7
Private	T. Rowe Price	Owings Mills	2,500	8
Government	Baltimore County Government	Towson*	7,800	9
Hospital	Northwest Hospital Center	Randallstown	2,292	10
Hospital	Sheppard Pratt Health System	Towson	2,227	11
Private	Carefirst Blue Cross of Maryland	Owings Mills	2,092	12
Private	McCormick	Hunt Valley	2,014	13
Private	Becton Dickinson & Company	Sparks	1,600	14
Private	AAI Corporation	Hunt Valley	1,550	15
Education	Baltimore County Community Colleges - Catonsville	Catonsville	1,468	16
Private	Stanley Black Decker	Towson	1,336	17
Private	MBNA Marketing Services	Hunt Valley	1,200	18
Private	Lockheed Martin Corporation	Middle River / Woodlawn	1,700	19
Private	Quest Diagnostics	Halethorpe*	1,200	20
Private	Whiting Turner Contract Company	Towson	1,103	21
Private	Procter & Gamble	Hunt Valley	1,100	22
Education	Baltimore County Community Colleges - Essex	Essex	1,010	23
Education	Goucher College	Towson	930	24
Private	PHH	Sparks	900	25
Private	Tessco Technologies	Hunt Valley	874	26
Private	The Travelers Indemnity Company	Hunt Valley	853	27
Private	Middle River Aircraft Systems, Inc.	Middle River	830	28
Education	Baltimore County Community Colleges - Dundalk	Dundalk	766	29
Government	United Parcel Service	Lutherville*	570	30
Private	RWD Technologies LLC	Catonsville	575	31

Sources: U.S. Bureau of Labor Statistics; Baltimore County Government; Baltimore Metropolitan Council.

\*: Multiple locations.



Baltimore County Department of Planning

# Planning Research Report

2013 Report ○ Economic Development and Prosperity

Chart 1b. Major Employers in Baltimore County by Type of Industry, 2012

Industry Type	Employer Name	Location	Employment	Map Key
Education	University of Maryland Baltimore County	Catonsville	3,258	6
Education	Towson University	Towson*	2,937	7
Education	Baltimore County Community Colleges - Catonsville	Catonsville	1,468	16
Education	Baltimore County Community Colleges - Essex	Essex	1,010	23
Education	Goucher College	Towson	930	24
Education	Baltimore County Community Colleges - Dundalk	Dundalk	766	29
Government	Social Security Administration	Woodlawn	12,750	1
Government	Centers For Medicare and Medicaid Services	Woodlawn	4,000	2
Government	Baltimore County Government	Towson*	7,800	9
Government	United Parcel Service	Lutherville*	570	30
Hospital	St. Joseph Medical Center	Towson	3,400	3
Hospital	Greater Baltimore Medical Center	Towson	3,331	4
Hospital	Franklin Hospital	Middle River	3,300	5
Hospital	Northwest Hospital Center	Randallstown	2,292	10
Hospital	Sheppard Pratt Health System	Towson	2,227	11
Private	T. Rowe Price	Owings Mills	2,500	8
Private	Carefirst Blue Cross of Maryland	Owings Mills	2,092	12
Private	McCormick	Hunt Valley	2,014	13
Private	Becton Dickinson & Company	Sparks	1,600	14
Private	AAI Corporation	Hunt Valley	1,550	15
Private	Stanley Black Decker	Towson	1,336	17
Private	MBNA Marketing Services	Hunt Valley	1,200	18
Private	Lockheed Martin Corporation	Middle River / Woodlawn	1,700	19
Private	Quest Diagnostics	Halethorpe*	1,200	20
Private	Whiting Turner Contract Company	Towson	1,103	21
Private	Procter & Gamble	Hunt Valley	1,100	22
Private	PHH	Sparks	900	25
Private	Tessco Technologies	Hunt Valley	874	26
Private	The Travelers Indemnity Company	Hunt Valley	853	27
Private	Middle River Aircraft Systems, Inc.	Middle River	830	28
Private	RWD Technologies LLC	Catonsville	575	31

Sources: U.S. Bureau of Labor Statistics; Baltimore County Government; Baltimore Metropolitan Council.

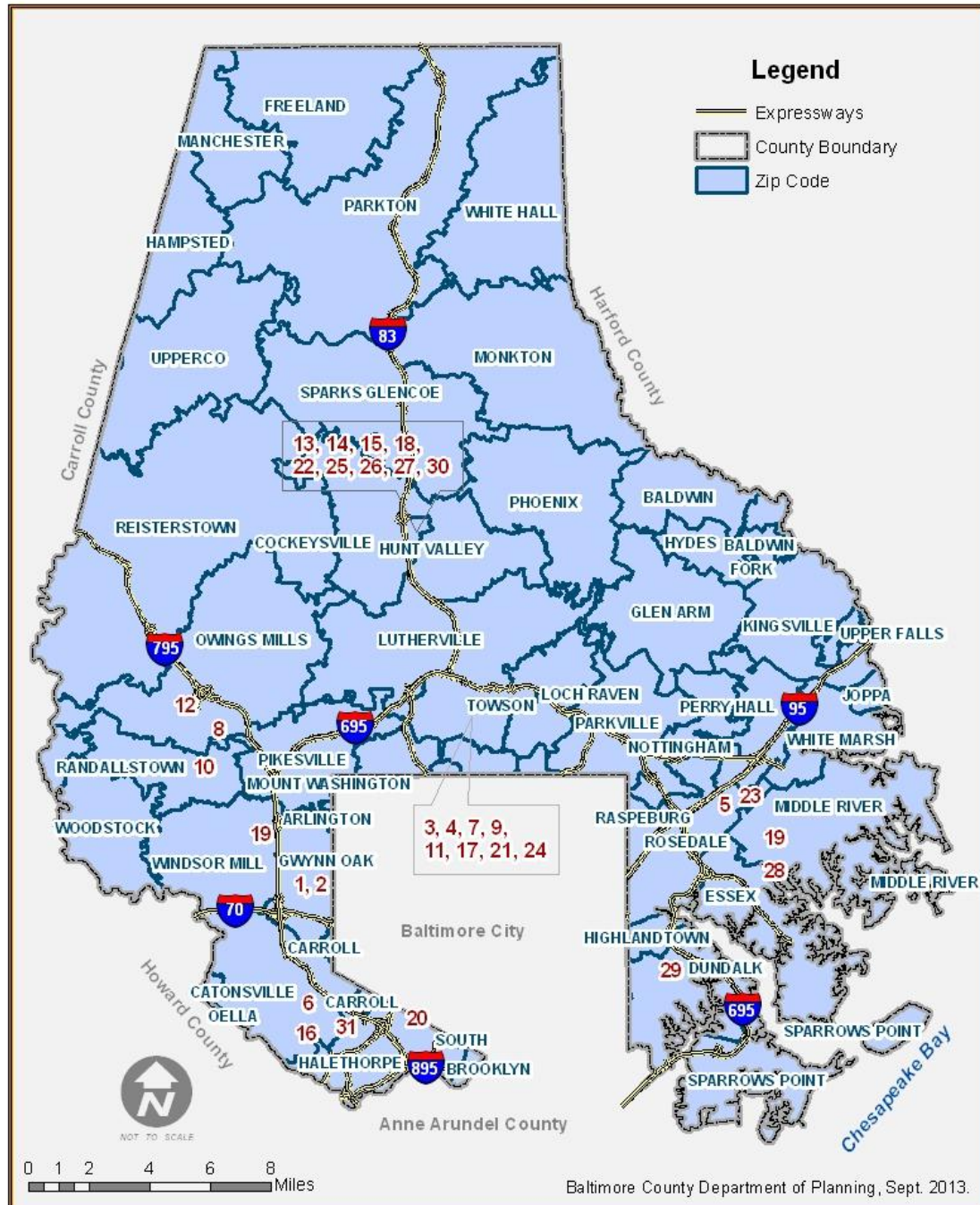
\*: Multiple locations.



# Baltimore County Department of Planning Planning Research Report

2013 Report ○ Economic Development and Prosperity

Map 1. Geographic Locations of Major Employers  
Baltimore County, Maryland







## Planning Research Report

2013 Report • Economic Development and Prosperity

### Thriving Economic Expansions

In the past 2 years, building on the success of the previous years, Baltimore County has flourished by expanding its economy at a substantial rate. There are numerous signature projects that have been planned, under construction, or completed. In August 2012, County Executive Kevin Kamenetz welcomed the opening of the *Towson City Center*, accommodating new corporate headquarters for MileOne Automotive, Towson University, Cunningham Kitchen, and other businesses in Towson (Photo credits: *The Baltimore Sun*).



Development in the Towson Core continues to bloom. In April 2013, Baltimore County Executive Kevin Kamenetz announced a \$60 million commercial and residential development in *Towson Triangle*, featuring apartment units and 10,500 square feet of street retail (*The Baltimore Sun*, April 24, 2013). *Towson Commons* is another exciting

project with 118,000 square feet of a health club, restaurant, and retail spaces (SierraUSA).

In January 2013, Baltimore County, together with The Cordish Companies and Heritage Properties, broke the round of *Towson Square* for the “first three best-in-class restaurants” and the leading motion picture exhibitor Cinemark Theatres. The \$85 million project will include eight restaurants and 15-screen, 3,400-seat theater complex, marking the official innovation for the project with mobilization currently underway and construction commencement in a matter of days.

In April 2013, Baltimore County Executive Kevin Kamenetz joined St. John Properties to reveal *Greenleigh at Crossroads*, a \$100 million project that will be the county's first major Town Center designed around the principles of “new urbanism.” The project includes more than 600,000 square feet of office and retail space with 1,700 residential units. Greenleigh will include mid-rise office buildings; a mix of detached single-family





Baltimore County Department of Planning

## Planning Research Report

2013 Report • Economic Development and Prosperity

houses, townhouses, multi-family housing buildings and condominiums, open space and park land, and a pedestrian-friendly streetscape design. Since 2007, more than two million square feet of office, R&D/flex, and retail space has been developed at Baltimore Crossroads, with approximately 3,000 people currently working in the business community (The Baltimore County Government; Photo credits: Baltimore City bizlist).

The *Metro Centre at Owings Mills*, a mixed-use, transit-oriented development currently under construction consists of more than 1.2 million square-feet of commercial office space, 300,000 square-feet of retail space, 1,700 residential units, educational facilities

totaling 120,000 square-feet, and a hotel component offering up to 250 rooms.



The project also is the home of the largest branch of the Baltimore County Public Library and the Community College of Baltimore County. Both facilities are open in 2013 (Photo credits: Baltimore County Public Libraries).

In April 2013, *General Motors* officially launched its new electric motor in White Marsh, a milestone in U.S. manufacturing and a key part of the company's stake that the electric-vehicle market is on the brink to grow. With production under way at this Baltimore County "eMotor" plant, the company is the first automaker to manufacture electric-drive motors domestically (*The Baltimore Sun*, April 16, 2013; Photo credits: bizjournal).







Baltimore County Department of Planning

# Planning Research Report

2013 Report ○ Economic Development and Prosperity

## State Leader in Industry Clusters

The definition of clusters is made with a combination of relevant industries by the North American Industrial Classification System (NAICS). Employment tabulations in the U.S. Bureau of Labor Statistics (BLS) include only wage and salary data reported by all employers covered by the Unemployment Insurance (UI) law of Maryland and Unemployment Compensation Law for Federal Employees.

Among Maryland's industry clusters for employment, Baltimore County ranked 1<sup>st</sup> in finance and insurance and retail trade (Chart 2). Baltimore County was the 2<sup>nd</sup> leader in bioscience, business services, health care, and hospitality and tourism in the state.

Chart 2. Employment Ranking by Industry Cluster by Jurisdiction, Maryland

Industry Clusters	Jurisdiction's Rankings and Percent Share of State Employment			
	First Ranking	% Share of State	Second Ranking	% Share of State
Aerospace Cluster	Montgomery County	28.6%	Anne Arundel County	17.0%
Bioscience Cluster	Montgomery County	30.1%	Baltimore County	11.8%
Business Services Cluster	Montgomery County	26.1%	Baltimore County	13.0%
Construction Cluster	Prince George's County	18.0%	Montgomery County	17.0%
Education Cluster	Baltimore City	19.6%	Prince George's County	17.3%
Finance and Insurance Cluster	Baltimore County	20.5%	Montgomery County	20.3%
Health Care Cluster	Baltimore City	22.9%	Baltimore County	17.8%
Hospitality and Tourism Cluster	Montgomery County	17.1%	Baltimore County	13.7%
Information & Technology Cluster	Montgomery County	37.0%	Prince George's County	15.2%
Retail Trade Cluster	Baltimore County	17.6%	Montgomery County	16.9%
Transportation & Warehousing Cluster	Baltimore City	19.4%	Prince George's County	18.5%

Source: Maryland Department of Labor, Licensing, and Regulation.

Furthermore, Baltimore County ranks 3<sup>rd</sup> in the number of employment in the construction or information-technology cluster. The county has the 4<sup>th</sup> largest employment in the aerospace, education, or transportation-warehousing clusters. The county's rankings in all the state's 11 industry clusters signify its strong economic base in the competing Washington-Baltimore market.

Baltimore County used to be the lead in the state manufacturing employment until the steel plant at Sparrows Point was shut down. This change in the manufacturing industry not only poses challenges but also opens opportunities for this exceptionally large tract of land in Baltimore County. In February 2012, County Executive Kamenetz established the Sparrows Point Partnership, a business advisory group chaired by the Baltimore County Department of Economic Development, to study opportunities for business attraction and job growth on the peninsula: [A Vision for Redeveloping SPARROWS POINT](#)



## Baltimore County Department of Planning Planning Research Report

2013 Report ○ Economic Development and Prosperity

### Professional and Services Economy

Baltimore County is the 3<sup>rd</sup> largest in population in Maryland, ensuring a large labor force to support employment that ranks 2<sup>nd</sup> among all 23 counties and Baltimore City in the state. The county's employment is predominantly non-farm (Chart 3).

**Chart 3. Total Full-Time and Part-Time Employment by Industry, Baltimore County, 2011**

Description	2007	2008	2009	2010	2011	2007-2011
Total employment	518,030	519,358	509,670	506,383	509,119	-8,911
By type						
Wage and salary employment	404,276	401,018	389,433	386,912	387,422	-16,854
Proprietors employment	113,754	118,340	120,237	119,471	121,697	7,943
Farm proprietors employment	611	610	605	606	606	-5
Nonfarm proprietors employment 2/	113,143	117,730	119,632	118,865	121,091	7,948
By industry						
Farm employment	1,071	1,020	1,001	1,050	1,037	-34
Nonfarm employment	516,959	518,338	508,669	505,333	508,082	-8,877
Private nonfarm employment	457,975	459,376	449,531	444,864	447,542	-10,433
Forestry, fishing, and related activities	420	432	405	399	405	-15
Mining	416	512	463	406	439	23
Utilities	(D)	(D)	(D)	(D)	(D)	
Construction	37,124	37,074	32,737	30,567	30,608	-6,516
Manufacturing	25,483	23,999	22,399	21,056	20,922	-4,561
Wholesale trade	14,479	13,939	13,368	13,502	13,647	-832
Retail trade	59,734	59,971	57,383	56,533	57,183	-2,551
Transportation and warehousing	(D)	(D)	(D)	(D)	(D)	
Information	9,213	9,040	10,061	10,493	7,680	-1,533
Finance and insurance	35,391	37,659	38,937	37,599	38,160	2,769
Real estate and rental and leasing	29,930	28,532	27,097	27,860	28,423	-1,507
Professional, scientific, and technical services	44,094	44,733	44,463	44,229	44,715	621
Management of companies and enterprises	3,607	3,551	3,326	3,407	3,491	-116
Administrative and waste management services	35,830	35,491	33,728	32,354	33,516	-2,314
Educational services	11,813	12,414	13,064	13,638	14,253	2,440
Health care and social assistance	68,676	70,298	72,013	73,003	73,696	5,020
Arts, entertainment, and recreation	11,547	11,813	11,901	11,936	12,146	599
Accommodation and food services	29,827	30,163	28,841	28,555	28,753	-1,074
Other services, except public administration	26,588	26,733	(D)	25,949	26,235	-353
Government and government enterprises	58,984	58,962	59,138	60,469	60,540	1,556
Federal, civilian	15,443	15,310	15,834	16,671	16,307	864
Military	2,293	2,350	2,340	2,369	2,575	282
State and local	41,248	41,302	40,964	41,429	41,658	410
State government	11,377	11,421	11,090	10,998	11,398	21
Local government	29,871	29,881	29,874	30,431	30,260	389

Source: U.S. Bureau of Economic Analysis.

(D) Not shown to avoid disclosure of confidential information, but the estimates for this item are included in the totals.



Baltimore County Department of Planning

## Planning Research Report

2013 Report • Economic Development and Prosperity

There are about 508,000 jobs in the non-farm sectors in Baltimore County, accounting for 99.8% of the total jobs. Among nonfarm employment, 88.1% is recorded in the private sector. The number of government jobs (60,560) is 11.9% of total non-farm jobs. All the industries are classified by the U.S. Census Bureau's North American Industrial Classification System (NAICS).

The economy in Baltimore County is professional and service-oriented. The county's major economic sectors are health care and social assistance, government, retail trade, and professional-scientific-technical services. The largest employment growth takes place in health care and social assistance, finance and insurance, and educational services.

Reflecting recent national trends, the economy in Baltimore County is professional and service-oriented (Chart 3). The county's major economic sectors are health care and social assistance, government and government enterprises, retail trade, finance and insurance, and professional-scientific-technical services.

Between 2007 and 2011, industries that have experienced the largest growth include health care and social assistance, finance and insurance, and educational services. Those industries are the leading economic engine or the market strengths in the county. There has also been an increase in the government jobs that took place in all the government levels.

The significant drop in employment has continued to occur in the manufacturing industry, as plants offered buyouts, shut down operations, or merged with other ventures inside or outside of Maryland. Unlike the first five years in this decade, the construction industry changed from an employment flourishing sector to one with dramatic job decreases. During the 2007 and 2011 period, the construction industry experienced the largest employment decline, as compared to all other sectors in Baltimore County. This reflects the economic recession in recent years.

The negative change in employment in wholesale trade, retail trade, and accommodation and food services mirrors the nationwide economic downturn and continual weakening consumer confidence. The employment cut in information and technology industry has sustained, likewise revealing national characteristics since the turn of this decade. The employment decline in the real estate and rental and leasing also is evident in the lack of the consumer confidence due to the continued economic recession.



## Planning Research Report

2013 Report ○ Economic Development and Prosperity

The administrative and waste services industry is defined in NAICS as Administrative and Support and Waste Management and Remediation Services, comprising establishments performing routine support activities for the day-to-day operations in a variety of industries. There is no further information to unveil reasons behind the reduction of more than 2,000 jobs in this industry. Yet, this reduction might have been attributable to the substantial decline in manufacturing.

### A Diversified Economic Structure

Location Quotients (LQs) assess the local distribution of a reference area's economic activity by comparing the industry's share of the local economy with that same industry's share of the economy in the reference area. The reference area is usually the U.S., but it can also be a state or a metropolitan area. The reference or base industry is usually the all industry total for the base and analysis areas. The LQ analysis helps track local changes in economic activity and compares local trends with the referenced area.

Chart 4 displays location quotients (LQ) for all the industries (private sectors only) in Baltimore County. Industries including health care/social services and finance/insurance have not only grown for the past six years but also demonstrated an increasing LQ that is greater than 1 indicating the importance of those industries in the county.

Even though construction, manufacturing, retail trade, real estate and rental and leasing, and management of companies and enterprises have experienced decline since 2007, those industries continue to demonstrate an LQ greater than 1. Industries including construction, wholesale trade, retail trade, information, finance and insurance, management of companies and enterprises, and educational services have gained in the LQ values since 2007, signifying a growing worth.

An LQ is the ratio of analysis-industry employment in the analysis area to base-industry employment in the analysis area divided by the ratio of analysis-industry employment in the base area to base-industry employment in the base area. An industry with an LQ greater than 1 is more prevalent in the locale than in the referenced area as a whole; an industry with an LQ less than 1 is underrepresented in the locale (Hoch, Dalton, and So: The Practice of Local Government Planning, 3rd Edition, ICMA, 2000).



## Baltimore County Department of Planning Planning Research Report

2013 Report ○ Economic Development and Prosperity

Chart 4. Local Quotients (LQ) by Industry by NAICS, Baltimore County, 2007 - 2012

Industry Title (North American Industrial Code System (NAICS))	2007	2012	2007-2012
Agriculture, forestry, fishing and hunting	0.57	0.4	-0.17
Mining, quarrying, and oil and gas extraction	0.37	0.34	-0.03
Construction	0.95	1.01	0.06
Manufacturing	1.19	1.06	-0.13
Utilities	ND	ND	-
Wholesale trade	0.78	0.82	0.04
Retail trade	1.11	1.13	0.02
Transportation and warehousing	ND	ND	-
Information	0.8	0.85	0.05
Finance and insurance	1.32	1.53	0.21
Real estate and rental and leasing	1.15	1.13	-0.02
Professional and technical services	0.78	0.75	-0.03
Management of companies and enterprises	0.95	1.01	0.06
Administrative and waste services	1.03	1	-0.03
Educational services	0.87	0.89	0.02
Health care and social assistance	1.18	1.16	-0.02
Arts, entertainment, and recreation	0.93	0.88	-0.05
Accommodation and food services	0.89	0.86	-0.03
Other services, except public administration	0.86	0.86	0

Source: U.S. Bureau of Labor Statistics. Reference Area: Maryland. ND: Not Disclosable.

The county business patterns also demonstrate that the county's economy is diversified and professional and service-oriented (Chart 5, p. 13). The industries with the largest establishments include retail trade, professional-scientific-technical services, and health care and social assistance, followed by construction, finance and insurance, and accommodation and food services. The highest annual payroll mainly occurs in these industries as well. On an average, the share of the number of establishments in Baltimore

Baltimore County's economy is professional, retail trade, and service-oriented in terms of the number of establishments and payrolls. The county's economy is dependent upon the operations and success of small businesses.

County is one in six of the Maryland total. In the payroll, art-entertainment-recreation has the largest share of the state's payroll, followed by management of companies and enterprises, finance and insurance, and retail trade.

Chart 6 (p. 14) shows that the county's economy is predominated by small businesses that have the number of employees between 1 and 50. The only exception is the utilities where 46.15% are operated and managed by small businesses (Photo credits: *The Baltimore Sun*).





# Baltimore County Department of Planning

## Planning Research Report

2013 Report ○ Economic Development and Prosperity

**Chart 5. Business Establishments and Payrolls, Baltimore County, 2011**

Industry Sectors	NAICS Code	Annual payroll (\$1,000)	% Maryland (Annual Payrolls)	Total establishments	% Maryland (Establishments)
Total for All Sectors		\$13,899,560	13.72%	19,627	14.73%
Agriculture, forestry, fishing and hunting	11----	\$898	3.13%	13	6.77%
Mining, quarrying, and oil and gas extraction	21----	\$0	0.00%	7	9.46%
Utilities	22----	\$0	0.00%	13	9.15%
Construction	23----	\$1,128,876	15.22%	1,856	13.28%
Manufacturing	31----	\$986,705	16.32%	450	14.55%
Wholesale trade	42----	\$748,249	14.00%	930	16.27%
Retail trade	44----	\$1,253,818	17.34%	2,733	14.98%
Transportation and warehousing	48----	\$251,565	9.33%	421	12.62%
Information	51----	\$419,969	10.13%	292	12.49%
Finance and insurance	52----	\$1,546,448	19.12%	1,489	19.25%
Real estate and rental and leasing	53----	\$319,096	14.94%	809	14.13%
Professional, scientific, and technical services	54----	\$1,654,556	8.67%	2,700	13.82%
Management of companies and enterprises	55----	\$880,521	19.81%	138	12.78%
Administrative and support and waste management and remediation services	56----	\$777,495	11.58%	1,244	15.75%
Educational services	61----	\$246,358	7.59%	256	12.85%
Health care and social assistance	62----	\$2,416,925	15.82%	2,576	16.46%
Arts, entertainment, and recreation	71----	\$248,722	25.14%	308	15.32%
Accommodation and food services	72----	\$425,108	12.41%	1,569	14.22%
Other services (except public administration)	81----	\$423,122	11.34%	1,803	13.60%
Industries not classified	99----	\$294	6.88%	20	9.39%

Source: U.S. Census Bureau.



Café Troia



Souris' Saloon

Photo credits: *The Baltimore Sun*.



## Baltimore County Department of Planning Planning Research Report

2013 Report ○ Economic Development and Prosperity

Chart 6. Number of Establishments by Employment-size Class, Baltimore County, 2011

Industry Sectors	Total*	'1-4'	'5-9'	'10-19'	'20-49'	'50-99'	100 -499	500 or more	Small Business**	% Small Business of Total
Total for All Sectors	19,627	10,400	3,675	2,555	1,822	658	468	49	18,452	94.01%
Agriculture, forestry, fishing and hunting	13	12	0	1	0	0	0	0	13	100.00%
Mining, quarrying, and oil and gas extraction	7	4	1	0	1	1	0	0	6	85.71%
Utilities	13	1	3	0	2	4	2	1	6	46.15%
Construction	1,856	1,169	285	182	141	47	31	1	1,777	95.74%
Manufacturing	450	185	68	53	85	23	30	6	391	86.89%
Wholesale trade	930	493	158	128	101	32	17	1	880	94.62%
Retail trade	2,733	1,118	630	510	258	112	103	2	2,516	92.06%
Transportation and warehousing	421	256	65	46	33	11	9	1	400	95.01%
Information	292	144	48	38	28	22	10	2	258	88.36%
Finance and insurance	1,489	825	308	190	96	32	33	5	1,419	95.30%
Real estate and rental and leasing	809	529	147	80	39	9	3	2	795	98.27%
Professional, scientific, and technical services	2,700	1,855	369	240	152	47	33	4	2,616	96.89%
Management of companies and enterprises	138	48	16	22	19	13	16	4	105	76.09%
Administrative and support and waste management and remediation services	1,244	679	174	148	149	45	43	6	1,150	92.44%
Educational services	256	119	37	39	26	17	16	2	221	86.33%
Health care and social assistance	2,576	1,129	696	344	235	74	86	12	2,404	93.32%
Arts, entertainment, and recreation	308	175	31	41	36	18	7	0	283	91.88%
Accommodation and food services	1,569	585	280	261	307	114	22	0	1,433	91.33%
Other services (except public administration)	1,803	1,054	359	232	114	37	7	0	1,759	97.56%
Industries not classified	20	20	0	0	0	0	0	0	20	100.00%

Source: U.S. Census Bureau. \*: Total Establishments. \*\*: With 1 to 50 employees.

### Commutation, Occupation, and Employment

Chart 7 (p. 15) portrays that among nearly 400,000 Baltimore County residents who are employed *and* commute to and from work, 50% work in enterprises, organizations, or government agencies in the county locations. The other 28.8% work for various employers in Anne Arundel or Howard counties. The residual of county residents commute to other Maryland counties or out of the state for performing their jobs.

In addition, among the employed civilian in Baltimore County, 42.5% (or 174,000 out of 409,000) perform their jobs in the management, business, science, and arts occupations (Chart 8, p. 15). Approximately 26.4% are employed in the sales and office occupations. This occupation characteristic also reflects that Baltimore County's economy is professional and service-oriented. The county residents who work for the private sector account for the majority of employed civilians. The percent share of employed civilians

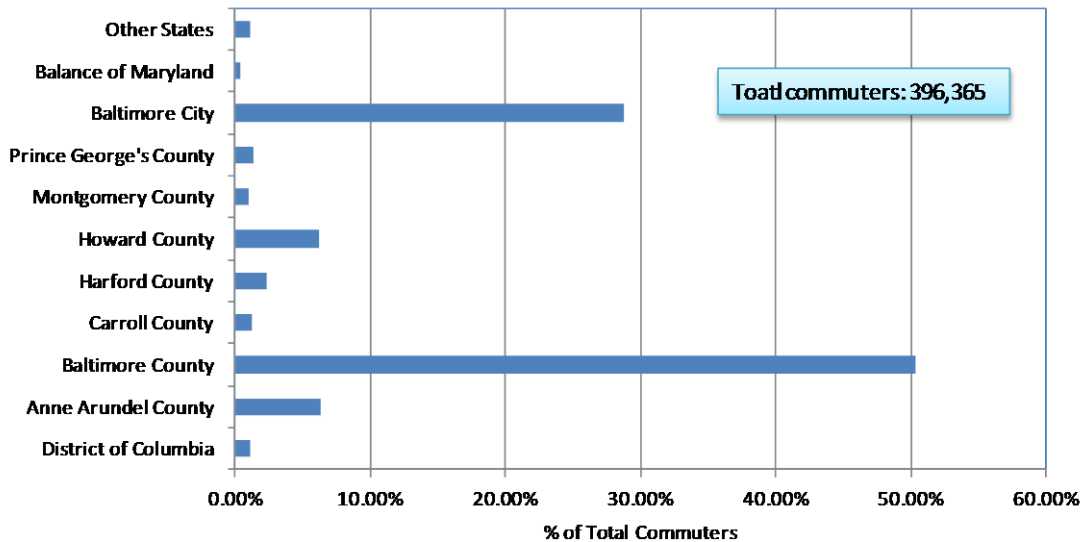


## Baltimore County Department of Planning Planning Research Report

2013 Report ○ Economic Development and Prosperity

in the government agencies rank 2<sup>nd</sup> but this percentage is far below the percent share of those in the private sector. County residents who are self-employed (in own incorporated or unincorporated businesses) or private not-for-profit organizations do not represent a significant proportion but may yield a noticeable number that contribute to the importance of the county's workforce.

**Chart 7. Workplaces Of Baltimore County (Employed Civilian Residents), 2006-2008**



**Chart 8. Occupation by Class of Worker for Employed Civilians, 2007-2011**

Data Subject	Total Civilian Employed Population	Employee of private company workers	Self-employed in own incorporated business workers	Private not-for-profit wage and salary workers	Local, state, and federal government workers	Self-employed in own not incorporated business workers and unpaid family workers
Civilian employed population 16 years and over	409,569	62.70%	3.80%	10.60%	18.20%	4.60%
Management, business, science, and arts occupations	174,031	49.70%	4.60%	16.20%	25.40%	4.10%
Service occupations	62,662	62.30%	2.50%	8.60%	19.40%	7.30%
Sales and office occupations	108,096	73.70%	3.40%	7.10%	12.60%	3.20%
Natural resources, construction, and maintenance occupations	30,107	77.00%	5.20%	2.70%	7.40%	7.70%
Production, transportation, and material moving occupations	34,673	81.70%	2.60%	4.00%	7.30%	4.40%

Source: U.S. Census Bureau.



## Planning Research Report

2013 Report ○ Economic Development and Prosperity

In 2013, approximately 7.3 percent of civilian labor force in Baltimore County was unemployed, an increase from 4.3 percent in 2005. Reflecting the recent progress of the national economic conditions and Baltimore County's sustained economic expansions, the unemployment rate of the county has been improving (Chart 9). The magnitude of employment decline in manufacturing might be a contributing factor in the county's unemployment rate. This might have also been in consequence of employment reduction in some other industries.

Chart 9. Unemployment Rate, Baltimore County, 2013

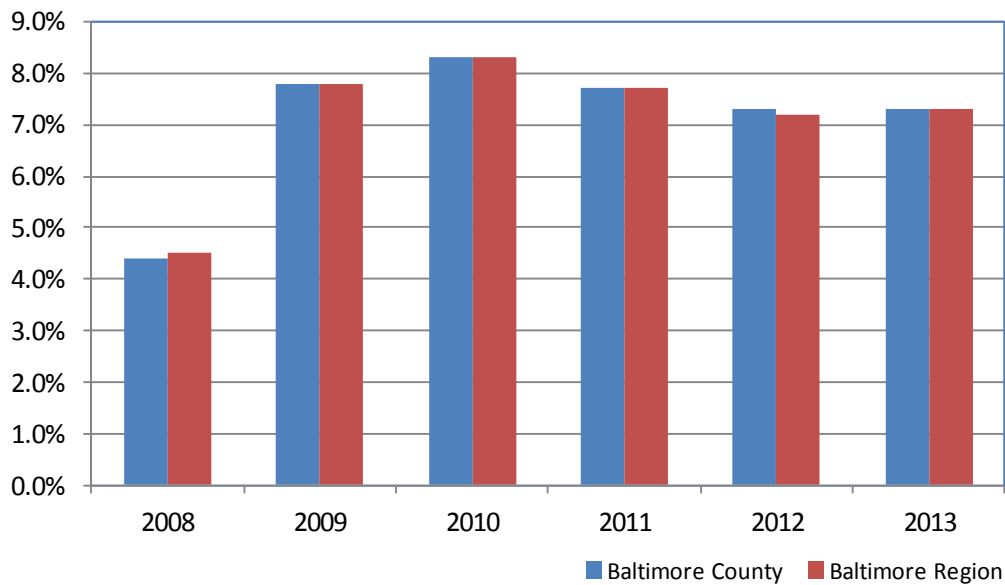


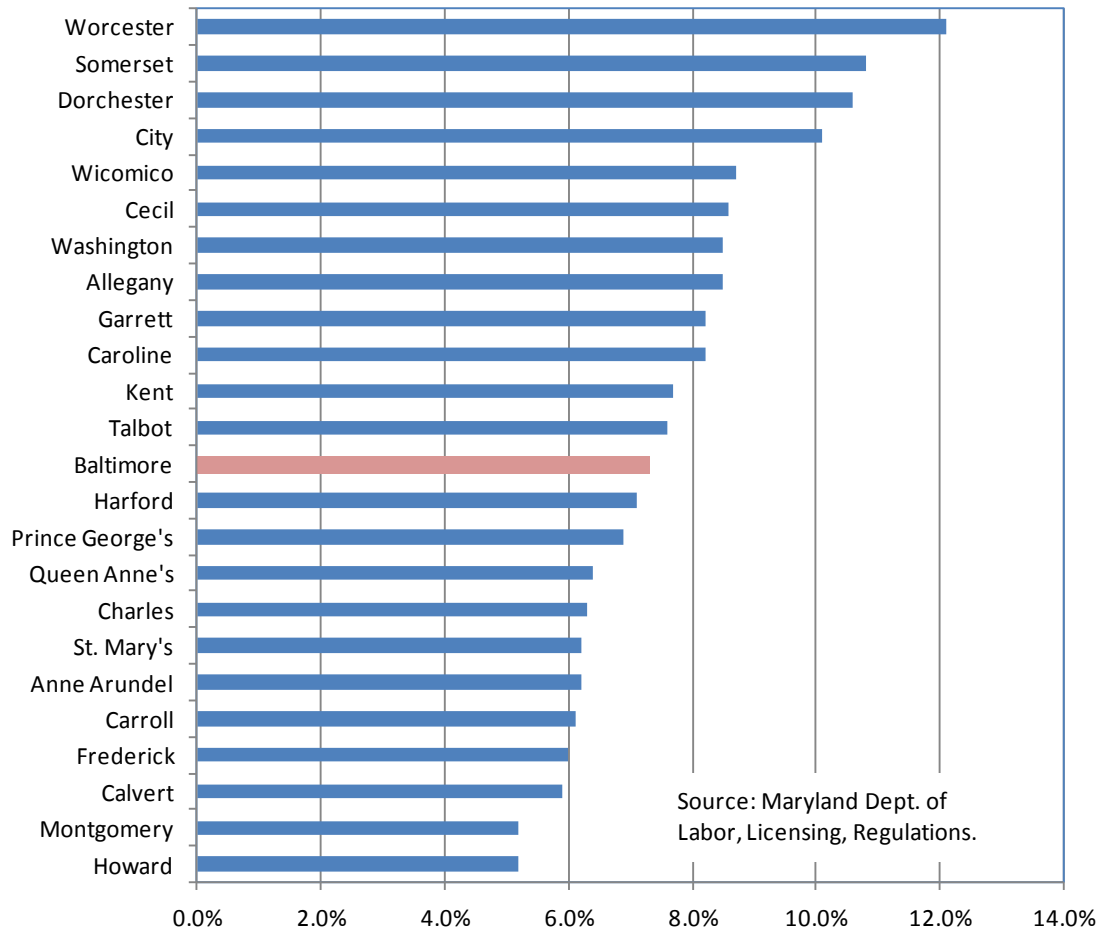
Chart 10 exhibits the unemployment rate among Maryland counties and Baltimore City. Baltimore County's unemployment rate is the 12<sup>th</sup> in the state. The counties with a higher educational level or a sizeable concentration of federal agencies and their contractors, or popular tourist designations show a relatively lower unemployment rate than other counties or Baltimore City. With the 5<sup>th</sup> highest in the percent residents 25 years or over earning advanced degrees (following Howard, Montgomery, Frederick, and Anne Arundel counties) and persevere commitments of moving forward economically, the county's unemployment rate will continue to drop in the future.



# Planning Research Report

2013 Report ○ Economic Development and Prosperity

Chart 10. Unemployment Rate, Maryland, 2013



## Conclusion

Baltimore County has been one of key leaders in the Maryland state economy. Situated in the midst of the Baltimore-Washington market – the 4<sup>th</sup> largest in the nation, Baltimore County is a hub of major employers (nationwide or statewide), with a diversified economic structure. The expanding economy has been attributable to a large labor force base and educated workforce. Baltimore County will well position itself by continuing to provide adequate public services, building quality housing, boost up businesses, nurture small enterprises, and collaborate with neighboring counties and Baltimore City. ■